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Online Shopping Behaviours during quarantine: Zara case study

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Dissertation presented as the partial requirement for obtaining a Master's degree in Information Management

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ONLINE SHOPPING BEHAVIOURS DURING QUARANTINE: ZARA CASE STUDY

by

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Dissertation presented as the partial requirement for obtaining a Master's degree in Information Management, Specialization in Marketing Intelligence.

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ABSTRACT

Nowadays, due to the phenomenon of globalization and technological evolution, the offer of goods and services has been growing exponentially and, consequently, consumers have more and more brands at their disposal. Naturally, this evolution has had a huge impact on the growth of online commerce. Virtually all industries have adopted online commerce, giving consumers the possibility to buy their products/services online, through computers or smartphones, without having physically to go to a store.

The fashion industry is no exception and increasingly invests in e-commerce to optimize the consumer experience. Brands have the ability to offer services that serve as an extension of the communication carried out in physical stores, therefore complementing the consumer's experience so that it becomes more real and satisfying. This type of commerce also allows the brands to better understand the customer needs and the major market trends, providing an increasingly satisfying consumer experience.

This dissertation intends to analyse the behaviours and relationships underlying online shopping by understanding what drives consumers to buy online instead of going to a store. I chose the Zara brand as the object of my study, not only because it is a brand with a lot of notoriety in the world market, but also because it has an extremely important position and relevance in the Portuguese market.

The conclusions and results of this study demonstrate that the tendency is towards online shopping. Through the quantitative analysis of the results obtained, it is possible to verify that Covid19 has increased the online purchases, however people are not very afraid of going shopping in person. They seem to choose the online option due to its comfort and efficiency. It is also discussed the importance of creating bonds between consumers and the brands since these relationships are later translated into profitability and growth for the companies.

KEYWORDS

E-Commerce; Online Shopping; Quarantine; Covid19; Zara;

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LIST OF ABBREVIATIONS AND ACRONYMS

ACEPI	Digital Economy Association
ANACOM	Autoridade Nacional de Comunicações
CTT	Correios de Portugal, S.A.
E-Commerce	Electronic Commerce
Eurostat	European Statistical Office
INDITEX	Industria de Diseño Textil
NOVA IMS	Nova Information Management School

1. INTRODUCTION

1.1. BACKGROUND AND PROBLEM IDENTIFICATION:

The evolution of the Internet and technology over the past years has led to an authentic digital revolution, both globally and worldwide. New sources of information and market opportunities have emerged, making competition increasingly impetuous. Companies have now different ways to conquer their target audience. This evolution allows them not only to offer a faster response to customers but also a greater number of products and services. But, on the other hand, it is much more difficult for companies to ensure their loyalty, because "within a click" anyone can buy from brands all over the world. The Internet has thus become a new lifestyle in which physical and temporal space is no longer relevant/important.

The globalization effect has also contributed to rapid economic integration, mainly through trade, financial flows, technology sharing, and information networks. The effects of globalization are reflected in the satisfaction of consumer needs with a wider range of products and services (Stanisic & Prodanovic, 2014).

E-marketing (product marketing through digital media) has become the latest trend in the market. Consequently, both the fashion industry and online commerce have benefited from enormous growth. Still, this type of trade allows brands to better understand the needs and trends of consumers, giving them a greater capacity for adaptation.

In this context, I will study not only the factors that affect consumer buying behaviour in online shopping but also the factors regarding the website design, reliability, and security that may influence the consumer buying behaviour, by doing an investigation on the relationship between the intention to shop online and the factors affecting such decision.

1.2. STUDY OBJECTIVES AND RESEARCH QUESTIONS:

The main objective of studying the motivations of online shopping is to be able to identify which factors attract and influence consumers to buy online. The true value lies not only in product and/or service consumption (of the product and/or service) but in the entire experience.

In Zara, stores are considered the soul of the organization, because there lies the basis of the entire process, shaped by the relationship between brand and customer. Store environment consequently influences purchase decision, as well as the consumer's view of the store. The store's atmosphere should reflect not only the brand values but also the frequent consumer profile (Danziger, 2018).

During the thesis development, different topics will be explored separately to establish connections later on. The main goal is to understand the online shopping context during a crisis, what are the main reasons why people prefer to buy online instead of going to a physical store. Nevertheless, the research questions can be summarised as follows:

RQ1: During the Covid19 crisis, have people changed their shopping behaviours?

1a) Are they buying less than before the pandemic?

1b) More specifically, are they buying more online than before the outbreak?

The first question links the crisis and fear of contagion. The main goal is to understand the impact that a worldwide health crisis has on the fear of contagion and how that fear impacts online shopping. In the present dissertation, I am interested in analysing the importance of the fear of contagion on online shopping behaviour.

Understanding the Covid19 and its effects as a crisis is very important in determining whether the clients feel safe or not. It's a segmentation based on trust, to determine if the customers will keep buying in the future. The study intends to analyse the relationship between the fear of contagion and the marketing strategies applied by the companies during a crisis.

RQ2: During this crisis context, have people changed their shopping behaviours at Zara?

2a) Have they started to buy more or fewer products?

2b) Have they started to buy different types of products?

This second question is related to the type of products that consumers buy during a crisis at Zara. We are interested in investigating whether people tend to buy more or fewer products and if they are buying more casual products instead of formal ones, due to their new lifestyles determined by the confinement.

RQ3: During the crisis have brands created new categories on their websites with casual/home wear?

This question is important to understand whether brands empathically adapted to the new needs of the customers. To answer this question, we will analyse a set of brands to see whether they created new categories on their online website.

1.3. METHODOLOGY:

This study aims to understand what the main motivations are when opting for online shopping instead of going to a store, more specifically in a crisis context. I chose this problem, because not only it is a very current topic, but it also fits my future field of study as I would like to specialize in developing online retail shopping platforms. Since the study of this subject may lead to an optimization of the process of online shopping as well as a reduction of its costs, I believe that this will be a valuable asset to analyse in the scope of this project.

I decided to carry out a study that focuses mainly on the Zara stores in Lisbon, Portugal. An in-depth analysis was made, in order to collect viable and detailed information about the company, such as the current environment and sales. The information provided by the survey was essential to enrich the contents of this dissertation and enabled me to obtain more insights into this subject.

Thus, this dissertation will provide detailed information and analysis on the behaviour of the online consumer and the Zara company as well as the characterization of the online consumers, exploring their motivations and intentions to buy online. Finally, an analysis of consumers' brand perceptions will be made with the main objective of understanding what leads the consumers to buy online rather than going to a physical store.

2. LITERATURE REVIEW

2.1. E-COMMERCE DEFINITION:

E-Commerce, also known as electronic commerce, is defined as the "transaction of goods and services between computers mediated by computer networks, and the payment or delivery of transacted products will not necessarily have to be done through these networks" (Eurostat, 2019).

The term E-Commerce is often mixed up with E-Business, so it is essential to make a clear distinction between these two concepts. The main goal of E-Commerce is to facilitate the purchase and sale of products and/or services over the internet by allowing the purchase and sale of products and services online (Malik & Guptha, 2013). Meanwhile, E-Business is characterized by having a more complex transaction method (since it encompasses market analysis, investment analysis, interaction with stakeholders, and also a detailed macroeconomic analysis) (Laudon & Traver, 2014).

It is also important to emphasize that the big difference between electronic and traditional commerce relies on the fact that in the first one the information is transmitted through a digital medium (Gunasekaran, Marri, McGaughey & Nebhwani, 2002). This form of commerce has revolutionized the way of doing business, by allowing consumers to make payments using smartphones and computers. Therefore, virtual stores play a strategic and central role for brands as they give up physical presence, consequently reducing costs (Benedicktus, Brady, Darke, & Voorhees, 2010).

ANACOM identifies two different types of activities within E-commerce: direct and indirect. Direct E-commerce consists of online ordering, payment and delivery (intangible goods) or services, allowing the existence of electronic transactions without any type of geographical barrier. Through this type of commerce, there is the possibility to explore the potential of the global electronic markets. Indirect E-commerce consists of the electronic ordering of products, which, due to their tangible nature (tangible goods), continue to have to be physically delivered, using traditional distribution channels for this purpose. Unlike direct activity, indirect e-commerce does not allow to exploitation of the full potential of global electronic markets.

2.2. E-COMMERCE EVOLUTION:

Can E-commerce continue to grow indefinitely? It is possible that, at some point, e-commerce growth may slow simply as a result of overload: people may just not have the time to watch yet another online video, open another e-mail, or read another blog, tweet, or Facebook update. However, currently, there is no foreseeable limit to the continued rapid development of Internet and E-commerce technology, or limits on the inventiveness of entrepreneurs to develop new uses for the technology. Therefore, for now, at least, it is likely that the disruptive process will continue (Berman & Kesterson-Townes, 2012).

E-Commerce emerges with the Internet evolution, and it has been growing at a rampant rate over the past few years (Singh, 2001). This goes beyond the use of the Internet as a means of production or organization. The internet has become a sales channel, enabling direct interaction between vendors/companies and the final consumer. With this digital revolution, significant changes have been occurring over all the economic sectors, which consequently have been changing the purchasing methods used by consumers, such as online shopping (Blázquez, 2014).

In 1994, E-commerce as we now know it did not exist. In 2013, less than 20 years later, around 155 million American consumers were expected to spend about $419 billion, and businesses more than $4.8 trillion, purchasing goods and services online or via a mobile device (Laudon & Traver, 2014). And during this short period of time, E-Commerce has been reinvented not just once, but twice. The early years of e-commerce, during the late 1990s, were a period of business vision, inspiration, and experimentation. There followed a period of retrenchment and re-evaluation, which led to the stock market crash of 2000–2001, with the value of E-Commerce, telecommunications, and other technology stocks plummeting. Between 2002–2008, retail E-Commerce grew by more than 25% per year (Laudon & Traver, 2014).

Nowadays social network which enables users to distribute their content (such as videos, music, photos, personal information, blogs, and software applications), has rocketed to prominence. Never before in the history of media have such large audiences been aggregated and made so accessible. Businesses are grappling with how best to approach this audience from an advertising and marketing perspective. Governments, private groups, and industry players are trying to understand how to protect privacy on this new e-commerce platform. It is probably safe to predict that this will not be the last transition for e-commerce, either (Laudon & Traver, 2014).

By assessing the evolution of E-Commerce in Europe it is possible to conclude that the countries of Western Europe continue to dominate the E-Commerce market, with a percentage of 68% of the total turnover (European Ecommerce Report, 2018). According to the same study, the United Kingdom stands out in this market with a turnover of around 178 billion euros, followed by France (93.2 billion euros) and Germany (93 billion euros). Regarding the Portuguese market, it is said that Portuguese are the ones that are most likely to purchase from a foreign e-retailer, holding a percentage of 85%, contrasting with other European countries such as Turkey (2%), Romania (3%) and Poland (6%).

According to a study by Nielsen (2018), global online sales in 2017 represented 10.2% of total retailers' sales, and in 2021 it is expected to reach 17.5%. Even referring to this same study, there is a forecast that for 2022 global sales of E-commerce will reach 400 billion dollars, being responsible for 10% -12% of sales of Consumer Goods.

2.3. Types of E-Commerce:

According to R. Turchi, S. (2018), it is possible to classify the different types of E-Commerce by analysing the relationships between the agents that participate in the network (such as government entities, companies, consumers, customers or citizens), as shown below:

- B2B (Business to Business): Business transactions between companies and entities;
- B2C (Business to Consumer): E-commerce, consumer organization transactions;
- B2E (Business to Employee): E-commerce of companies that sell services or products to their employees;
- B2I (Business to Institutions): Electronic transactions between companies and institutions (educational, associations, etc.);
- B2G (Business to Government): Business transactions between private and government companies;
- C2B (Consumer to Business): Transactions between consumers or customers and companies;
- C2C (Consumer to Consumer): E-commerce directly between consumers;
- C2G (Citizen to Government): the electronic relationship that involves citizens and government entities;

- E-Procurement: E-Commerce used by companies to acquire supplies;
- E2B (Employee to Business): Commercial transaction which involves the company and its employees;
- G2B (Government to Business): Transaction that involves governments and companies;
- G2C (Government to Citizen): Transaction that involves agents such as government entities and citizens;
- G2G (Government to Government): Commercial transaction involving federal, state or municipal government entities;
- Mobile e-commerce – use of mobile devices to enable transactions - social e-commerce – integrating e-commerce with social media;
- Local e-commerce – the main driver is geographical location – Groupon.

2.4. ONLINE SHOPPING TRENDS:

Internet enabled a new digital space, breaking through geographic and territorial barriers. By allowing its users and companies to exchange information and data in a fast and simple way, a digital culture was created in which distance and time become less relevant factors, once everything is separated by a simple click. This progress triggered a revolution in marketing and several paradigms for the physical world have been broken (Wood, Faulconbridge, Watson & Teller, 2020).

E-Commerce is known for having eight unique features: ubiquity, global reach, universal standards, social technology, personalization/customization, information density, interactivity and richness (Laudon & Traver, 2014). These unique dimensions of e-commerce technologies suggest many new possibilities for marketing and selling—a powerful set of interactive, personalized, and rich messages are available for delivery to segmented, targeted audiences. E-commerce technologies make it possible for merchants to know much more about consumers and to be able to use this information more effectively than ever before. Online merchants can use this new information to develop new information asymmetries, enhance their ability to brand products, charge premium prices for high-quality service, and segment the market into an endless number of subgroups, each receiving a different price (Benedicktus, Brady, Darke, Voorhees, 2010).

More and more people and businesses are using the Internet to conduct commerce; smaller, local firms are learning how to take advantage of the Internet as Web services and Web site tools become very inexpensive. New e-commerce brands emerge while traditional retail brands such as Walmart and Target further extend their multi-channel, bricks-and-clicks strategies and retain their dominant retail positions by strengthening their Internet operations (Reinartz, Wiegand & Imschloss, 2019). However, these same social networks have created significant privacy issues. The major digital copyright owners have increased their pursuit of online file-swapping services with mixed success, while reaching broad agreements with big technology players like Apple, Amazon, and Google to protect intellectual property rights. States have successfully moved toward taxation of Internet sales, while Internet gaming sites have been severely curtailed through criminal prosecutions in the United States. Privacy seems to have lost some of its meaning in an age when millions create public online personal profiles (Livingstone, 2008).

The percentage of Portuguese who used the Internet in 2017 was 73%, and it is estimated to rise to 91% by 2025. This sharp increase shows that the usage of the Internet will be increasingly transversal to any generation. As for the level of online shopping, it also suffered a sharp growth over the past few years. 59% of the Portuguese population is expected to make online purchases in 2025 (study carried out in 2017 by the ACEPI).

Among the most purchased online products by Portuguese consumers are clothing and fashion accessories (49.6%), followed by mobile equipment and accessories (47.8%), computer equipment (35.1%), books (30.6%), perfumery and cosmetics (26.0%), household appliances (13.9%), toys (12.2%), food items (11.8%) and finally films and software (8.5%) (Nielsen, 2018). The frequency of online shopping has also increased over the last few years, with a gradual increase in the number of products purchased and in money spent on online purchases. This is due not only to the convenience provided by this method of shopping (more competitive prices and bigger and better discounts), as well as to the increased confidence and security associated with this type of transaction (Neves & Pimenta, 2018).

Concerning the means to accomplish the online purchases, computer prevails; however, the use of smartphones has been growing (given that four out of ten Portuguese made purchases online using it) (Nielsen, 2018).

Concerning payment methods used to finalize online purchases, there is a significant preference for payments by ATM and PayPal, since these ensure the confidentiality of personal data. So, the use of credit cards continues to be reduced, due to the greater insecurity associated with this means of payment.

2.5. Advantages and Disadvantages of buying online:

Currently, E-commerce is used by a large majority of the world population, presenting numerous benefits, both for the consumer and for companies (Karakaya & Shea, 2009).

There is less waste of time since nowadays it is possible to update the products'/services' information and details 24 hours a day, to and at any place (Bergendha, 2005). There is a great internationalization of products and/or services resulting from the ease of buying and selling online (Bell & Loane, 2010). In addition to this, the easier and quicker access to international markets allows not only greater customer acquisition but also the consolidation of the companies' position in the market through increased sales (access to new distribution channels), higher quality of products/services provided and better profit margins. Concerning fixed costs, these are also relatively lower for companies (Hooley, Piercy & Nicoulaud, 2008).

In addition, consumers are faced, currently, with a wide variety of products, which makes it easier to compare the products among themselves (Hooley, Piercy & Nicoulaud, 2008). Consumers can thus choose the option that best satisfies their needs, having also at their disposition several payment methods that facilitate the purchase.

E-commerce has also some disadvantages, both for the company and the consumer. It is not always possible to meet consumer expectations, not just because they are very demanding, but also because often the mediators do not facilitate. For example, in the case of shipping, it is not always possible to meet the deadline that is given to consumers. In addition, the little contact between the company and the consumer and the fact that the customer cannot feel or try the product, in some cases, negatively influences customer satisfaction (Falk, Sockel & Chen, 2005). Niranjanamurthy (2013) also states that one of the limitations of e-commerce limitations is the insecurity felt by the consumers resulting from the fact that it is not possible to try products before purchasing them (M, N, Jagannath & Chahar, 2013).

2.6. CONSUMER PSYCHOLOGY MOTIVATION:

Consumer behaviour is a subject that has been studied during the last years, as online purchases started to strongly emerge. However, it is difficult to understand consumer behaviour, as its assessment depends not only on itself but also on its motivations, preferences, attitudes, classes and groups to which it belongs, its needs and even its behaviours in buying decision (Solomon, 2008). The growing relevance of virtual channels for business across the globe triggered the attempt to understand the online behaviour of consumers by researchers and professionals in the field (Diorio, 2020).

The behaviour of online shopping can be explained by the type of use and the motivations for using the Internet; involving more objective aspects such as the number of connections to the network per day, or even more motivational aspects, namely the benefits sought by the consumer (Katawetawaraks & Wang, 2011). "Global researches show that only 20 % of all purchases are planned, the remaining 80 % are impulsive, based on emotions. After visiting a shop, customers should get a feeling that traders understand their needs, not only before the purchase is made but also after" (Svatošová, 2013; pg.21).

At the same time, more factors can also have an influence on the decision-making process besides motivation, such as social conditions, habits, offer and demand and last but not least the sale method and technology. According to Veronika Svatosová, the factors influencing the behaviour of the consumer can be divided into two basic groups, external and internal ones. The external factors include cultural and social or demographic factors and the internal ones include personal and psychological factors. Plus**,** purchases of every individual are influenced by four psychological factors: motivation, perception, learning and attitude (Svatošová, 2013).

Nonetheless, with the development of online purchases, some principles of buyer behaviour are also changing. It is easier than ever for any user to find any type of information not only about the products but also about the brands and companies. Which consequently leads to online competition and dispute between companies by computing between each other but also with potential customers (positive and negative references, internet communities, social networks and social media). Reviews and opinions of customers have a huge influence on the decision buying process; traditional marketing activities are no longer effective, so new ones had been created (marketing on social networks and media, viral marketing, online word-of-mouth and buzz marketing) (Svatošová, 2013).

With this increase, there was also a relevant change in the demographics. The older generation who used to find and try the product on traditional and who lived most of their lives without online communication is now becoming online shoppers and companies should also focus on them (Svatošová, 2013).

Finally, it is important to bear in mind that fashion can be unpredictable, so people tend to buy clothes for illogical, emotional reasons. Scott Sternberg stated that the real challenge is building a brand that could be immune to trends and novelty and whatever dystopian disaster was coming next (in Aleksander, 2021).

2.7. Online Shopping during a crisis:

Since the outbreak of Covid19, most of the luxury, mass-market fashion, and beauty industries have undergone significant changes. With consumption on hold for a few weeks and stores temporarily closed, there was a widespread slow-down.

However, with the worldwide quarantine announcement in March, there was a significant increase in online sales. The fashion industry suffered an increase in exchange rates (+7.5%), especially in ready-to-wear products. A consumer sentiment survey conducted by McKinsey&Company in April showed that online purchases increased by 30/40% in Europe and North America, even in countries that haven't been under full lockdown (Gonzalo, Harreis, Sanchez Altable & Villepelet, 2021).

For years, many authors, such as Scott Sternberg, have been saying that the fashion industry was a giant bubble heading towards collapse. Now the pandemic has just sped up the inevitable. An incredible surplus of items is sitting in warehouses and in stores, some of which might never reopen. Sternberg said: "That whole channel is dead. And there's no sign of when it's turning on again." In April, clothing sales fell 79 per cent in the United States, the largest dive on record." (in Aleksander, 2021). Marc Jacobs said he had to lay off "a bunch of people" and ask others to take pay cuts. Anna Wintour, the editor of Vogue and artistic director of Condé Nast, also stated in May (in Aleksander, 2021).

For an industry that is meant to be about change, sometimes we take a long time to do just that because it's so big and there are so many moving parts. But now we were forced into a moment when we had to reset and rethink (in Aleksander, 2021).

Meanwhile, as the shops were decreasing, purchases of sweatpants increased by 80 per cent. And the biggest concern of some retailers has become whether, in the future, people will buy clothes that aren't sweatpants.

Some are already designing with that uncertainty in mind. Batsheva Hay was pivoting from party dresses to housedresses: "I'm just like, OK, we're home more, but why does that have to be sweatpants?" she said. "Can it be a dress? A housedress is completely easy. You can throw it on, zip it off, whatever. Maybe I'm going too far imagining a future where we're constantly in and out of quarantine, but businesswise, I'm sort of preparing for that." And if that's the case, what happens to luxury designers? When asked about online shopping, Marc Jacobs told Business of Fashion: "I love to go to a shop. I like to see everything. I like to touch it. I like to try it on. I like to have coffee. I like to have a bottle of water. I like to get dressed up." He raised his eyebrows for emphasis. "But ordering online, in a pair of grubby sweats, is not my idea of living life." (in Aleksander, 2021).

In addition to buying more online, the time consumers were spending on these websites also increased by 13.9%. However, the traffic and number of transactions remained the same, demonstrating that consumers tend to buy more whenever they are on their favourite clothing website (Comarketing-News, 2020).

The challenge for mass-market fashion brands become then to keep customers loyal and at the same time survive through an uncertain period. Customers instead of being looking for trendy items were at home searching for information to understand what was happening around the world. And the concerns were mainly what the future of the industry will look like, and what type of marketing strategies will shape it (Binar, 2021).

Delivering an excellent customer experience online became crucial. Most of the brands focused on reallocating their resources and shift management attention from offline to online and by scaling up capabilities in both demand generation and fulfilment. By eliminating points of friction in every part of the online customer journey and improving their website's search function. Some retailers have redeployed store personnel from closed stores to support online fulfilment or to assist consumers via digital call centres (Gonzalo, Harreis, Sanchez Altable & Villepelet, 2021).

Companies defined their strategies to stay engaged with their customers and be creative. A lot of brands created strategies to promote engagement and keep the consumers motivated. Stradivarius created on Monday, March 23 a live stream #musictostayhome with the famous Mexican singer and actress, Danna Paola from the trendy Netflix TV show ELITE. Oysho promoted its website with a “when I stay at home” collection. H&M also added on its home page a selection of garments mixing all genders and age and homeware for a more “cosy” experience every day. Many brands also sent newsletters to customers; the first type of newsletters sent were the ones telling the customers that, due to government decisions, stores had to be shut down, but the online channel is still available. The second wave of newsletters informed the customers about the various offers made by the retailers: Zara and H&M offered free delivery for any online purchases (RETVIEWS, 2020).

Besides that, Zara also showed their consumers that they care and that retailers will do everything in their power to help during the pandemic situation. Amancio Ortega, the founder of Inditex, was transparent about the group’s actions by announcing that the group will be delivering 300,000 masks per week and will be involved in the production of health-protective equipment to help the first-line workers such as medical workers but also cashiers and police officers, who are still working outside to help us all be safe inside (RETVIEWS, 2020).

Transparency is the keyword of this Coronavirus period for retailers. They can maintain goodwill and minimise the possible damages on brand loyalty by showing their customers they share their concerns and are working on the challenges faced by the customers.

3. CASE STUDY – ZARA:

3.1. ZARA – FASHION AND CONSUMPTION:

Zara's story begins with the opening of the first store in the Spanish coastal city of A Coruña in 1975. Over the years Zara has been improving and developing itself. It is a brand that gives big importance to its core values and that has remained faithful to them through the years: beauty, clarity, functionality and sustainability (Roll, 2020).

> "Bringing attractive and responsible fashion, and improve the quality of customer service, are Zara's priorities. We want to create value through beautiful, ethical, quality products with a complete cycle of life. We act precisely and responsibly in every stage of the fashion process from design and sourcing to manufacturing and quality control, logistics and sales through stores and online." (Crofton & Dopico, 2007).

Aiming to encourage a highly intimate relationship with its customers, Zara's designers respond instinctively to their consumer's needs and changes by delivering weekly new trends to all the collections (Inditex Annual Report, 2018). Annually, Zara creates two collections: Fall/Winter and Spring/Summer, starting in July and January, respectively.

3.1.1. Fast-Fashion:

"Fast-fashion" is the term used when referring to the pattern of accelerated production and consumption (Costa, Soares, Pinto, Au-Yong-Oliveira & Szczygiel, 2018). This has not only caused serious environmental problems but has also dramatically shortened the life cycle of retail products. Consumers are endlessly waiting for news and new collections.

Zara, recognized worldwide as a prominent brand and as Europe's largest clothing retailer, is one of the brands that deals with this fast-fashion problem. However, the brand that is considered by Interbrand (2017) the 24th most valuable brand in the world, never resorted to marketing and advertising campaigns to reach the consumer (Kotler & Keller, 2009).

When it comes to Fast-fashion, Zara performs, like other luxury brands, such as Gucci, Prada and Yves Saint Laurent, producing their products in Europe (mostly in their factories in Spain) to ensure greater control and product quality. However, contrasting with these brands, Zara is able to sell the products at low prices maintaining the quality in the production so that the latest fashion trends are accessible for everyone (Crofton & Dopico, 2007).

"The main goal is to make Zara's fashion available to as many people as possible, moving from dreams to reality. Those are the main secrets behind the Zara concept" (Kalil, 2010).

Over the years, the brand has been implementing strategies to become more sustainable; namely making only small quantities of each article, so that, at the end of each season, there are not many pieces left, but in case it happens, they can be easily removed and replaced by another one (Simmel, 1957). By adopting this limited production method, Zara has greater control over the production and distribution of the products, as it is possible to reduce the stock accumulation and the overload of deadlines.

The main objective of this fast rhythm of production is to create an image of high demand and scarcity, creating thus a need for consumers to buy more and quicker (Baghi, Gabrielli & Codeluppi, 2013).

"In several stores, customers know the exact days that the new collections are launched, and they line up to buy the news. This is the difference between offering what you have to sell and what the public wants." (Kalil, 2010).

The brand thus becomes an addiction for the consumer. Consumers not only go to stores more frequently to check out the new collections that were launched but also by knowing that the pieces come in limited lots, they do not want to risk not buying and losing the products they so desire (Roll, 2020).

This process of Fast-fashion and consumption becomes consequently a routine and a constant cycle, both for the brand and to the consumers (Guemawat & Nueno, 2006). Satisfying the consumers' wishes and needs, in a fast, effective and continuous way, maintains Zara's relationship with its consumer, in a vicious and continuous cycle.

3.1.2. Evolution and Expansion:

Being a very famous brand with a huge development over the years, Zara has benefited from enormous growth and improvement since it was established.

Zara's central services are based in Arteixo. From scratch, the main products sold were products for women, men and children's clothes. Initially, the products were mainly produced in the Group's factories but step by step the product line was complemented with external suppliers, small factories, cooperatives and third countries (Salgado & Blanco, 2006).

Expansion worldwide has increased through the years, having already more than 2250 shops worldwide (2839 when including Zara Home). It is physically present in 96 markets (but sells for 202 markets) and launches 10 000 new styles annually. In Europe, Zara has more than 1300 shops; in Asia, more than 570 shops and finally, in the United States, Zara has 345 shops in 18 countries. It has also a large dominance in the online market being present in 22 countries.

In 1963, on 15 May Inditex was founded in Coruña, Spain. In 1975 the first Zara stores opens there. In 1977 Zara inaugurates its first retail factories (GOA and Samlor) in the surroundings of Coruña with the main objective of “selling fashionable clothing at low prices”. In 1983 Zara expands across Spain opening more eight stores. Then, in 1985, Inditex incorporated all the brands together under one banner. It was also developed a distribution system with a high capacity to adapt to the market fluctuations and consumer trends. In 1988 Zara was already operating in 32 countries with 282 stores, one of them being in Portugal, Porto (Inditex, 2020).

There are also remarkable and important facts on these dates: in 1995 Zara launches the Trafaluc line (a new line specially designed for teenagers and adolescents).
And in September 2010, Zara goes online for the first time and by the end of that year, the online platform was live in 16 European markets).

Finally, in 2018 Zara launched its global online store in 106 markets where stores had not existed.

3.1.3. Financial Information:

During years, Inditex functioned as a trinity having as rulers Amancio Ortega, José María Castellano and Juan Carlos Rodriguez Cebrian (Salgado & Blanco, 2006). Nowadays the Group operates on a two-headed model: while chief executive officer Pablo Isla, from Altadis, is in charge of corporate areas, Amancio Ortega, founder and executive president, maintains close control over the group's chains and commercial and product policy.

The financial information available in the Inditex reports, Zara plus Zara Home in 2019 had a profit of 19685 million euros (an increase of 1558 million euros from 2018). Its ROE has been constant, ranging only 1 to 2% between 28 and 30%, from 2018 to 2019. Inditex revenues in 2018 reached 26,1 billion euros and in 2019 28,3 million euros, having a growth of 8 % annually.

Zara had posted international sales of 28286 million euros during 2019 in which online sales accounted for 12% of the total sales (Inditex Annual Report, 2019). Zara accounted then with 2866 physical stores.

According to this same report, online sales grew 23% reaching 3,9€ billion euros, in which 14% was net sales and the group share price closed 2019 at EUR 30.37 per share on 31 January 2020. The average daily trading volume was approximately 6.1 million shares. Inditex's market capitalization stood at EUR 94,653 million at the end of the period, up 933% on its capitalization when its shares were admitted to trading on 23 May 2001, as compared with a 3% decrease in the Ibex 35 index in the same period. The dividend for 2018 totalling EUR 0.88 per issued share was paid in May and November 2019.

Due to Covid19 Zara suffered a severe loss in both store and online sales. They decreased by 4.9% from 1 February to 16 March 2020. Store and Online sales in local currencies declined by 24.1% from 1 March to 16 March 2020. And 3,785 stores are temporarily closed in 39 markets. All stores in China are open except for 11 stores. However, the underlying growth rate in LFL sales of Inditex continues to be 4%-6%. (Inditex Annual Report, 2019).

3.2. BRAND ELEMENTS:

A Brand is composed of at least four essential elements, Name, Logo, Package and Slogan (Kladou, 2017).

Amancio Ortega initially named the store Zorba but after realizing that there was a bar with the same name two blocks away, they rearranged the letters moulded for the sign to "Zara" (Hansen, 2012). It is composed of just four letters; it is easily memorable and all around the world pronounceable and it has been changed through time: the initial one appears with the foundation of the brand in 1975, the second in 2010 and the third, and last, during this year, to keep the brand fresh and modern (Salgado & Blanco, 2006).

Another characteristic of the brand is the logo as a word (colours & style). To package the items, the brand opted for using paper shopping bags 100% recycled. The brand uses black and white label tags as the logo (Inditex, 2020).

And, unlike brands in general, Zara does not have a slogan. However, that is something typical of fashion brands (Brydges & J.Hracs, 2018).

3.3. Brand Personality:

Brand personality is described by Aaker (1996) as a set of human attributes given to a certain brand. These attributes or characteristics are what leads consumers to interact with a brand and in some cases get attached to its products. Therefore, if a brand does not have these human features/personality traits, it most likely to lose its personality.

Brand personality is a crucial part of brand identity, it is what makes a brand exclusive and different from the competition, it is used to enhance the image of a brand to consumers, and can also bring a powerful brand association, especially when it comes to products (Gelder, 2004). The characteristics of the products will be influenced by how consumers perceive the brand; thus, the product-related characteristics are one of the main priorities of brand personality (Aaker, 1996).

Zara is a great example of how these brand personality traits can be put into practice. According to the book "De Zero a Zara" (Salgado & Blanco, 2006), Zara´s main personality traits are Fashionable; Trendy; Surprising and Young. These four characteristics are very present in every component of the brand image (such as the products, promotions and when opening new stores) which makes it easy to understand this choice. This is the obvious profile throughout all its stores. In line with the brand personality, the company chooses locations with very particular characteristics. One example of this is the store in Antwerp, which is located in an old bank building with huge glass windows, accomplishing a very strong impact and fashionable appeal.

3.4. Values:

Zara is considered one of the most innovative stores in the world. It is one of the only stores that does not spend money on advertising because it does not need to. Instead, Zara prefers to use that money to open new stores (Ghemawat & Nueno, 2006). This strategy gave Zara a competitive advantage over its competitors because it managed to maintain its advertising costs extremely low. Zara's advertising investment is between 0 and 0.3%, once its competitors vary between 3 and 4%. Also, with these cuts in the advertisement, they have a reduction of their total expenses, which makes the international expansion more economical (Inditex Annual Report, 2019).

Zara has the main advantage of producing 60% of its products, relying on its Spanish textile suppliers and designers. This type of very centralized production allows a very fast distribution since the main storage is very close to the distribution centre in Arteixo and the factories in Coruña. It also helps the brand be as flexible as it needs to be in creating a variety of new and unique styles. This ensures rapid product turnover as the manufacturers can take better control of the stock and the production process (Salgado & Blanco, 2006).

Zara is also known for having high-quality customer service. All the stores have devices with Radio Frequency Identification Technology (RFID), using cutting-edge systems to track the location of garments instantly and making those most in-demand rapidly available to customers. With this high-point technology, Zara has been able to have a constantly updated stock. Besides that, it also gives the customers the possibility to check online the stock available in every store (Inditex, 2015).

To develop its core value "sustainability", Zara has not only been producing a new line for its collections "Join Life" but has also implemented the eco-stores. These developments have been further enriched by a range of new and innovative projects, such as the installation of clothing recycling containers in-store and a scheme providing for a free at-home collection of used garments to complement the delivery of online orders (Roll, 2020). Also, it was launched a denim clothing collection made from recycled jeans recovered from non-profit organisations that collaborate with the clothing collection programme "Closing the Loop", to create new garments using recycled materials, thus extending their life cycle.

To be easier to accomplish their values, Zara also defined a set of goals to be pursued in the next years (present in Inditex Annual report 2019):

Year 2020:

- 100% of eco-efficient stores in all formats.
- Over 25% of "Join Life" garments.
- Total elimination of plastic bags in all our formats.

- Used clothing containers in 100% of our stores.
- Zero Discharge Commitment by implementing better wet- processing throughout the supply chain.
- The Canopy commitment: 100% sustainable forest certified garments.
- 100% of designers trained and specialised in circularity (Global Fashion Agenda commitment).

Year 2023:

- Zero waste from our facilities: corporate offices, logistics centres and own stores (Zero Waste).
- 100% of sustainable cellulose fibres, supporting the responsible viscose commitment (Changing Markets RoadMap).
- 100% elimination of single-use plastic for customers.
- 100% collection of all packaging materials for recycling or reuse in the supply chain (Green to Pack).

Year 2025:

- 80% of renewable energy consumption in all facilities (main offices, logistics centres and own stores).
- 100% sustainable cotton (organic, Better Cotton Initiative and recycled).
- 100% sustainable polyester.
- 100% sustainable linen.

In addition to the update of the Strategic Sustainability Plan, it is important to mention that 2019 saw the creation of the Sustainability Committee, a delegated committee of the Board of Directors.

Zara's main objective is the promotion of its brand awareness. To assure that those objectives are accomplished, the company created an exclusive department. It seeks to acquire global prime real estate locations for stores all over the world. It is also responsible for the renovation of store' layouts and creating the windows displays. With this commitment, Zara merited *LEED certified*, *LEED Gold and LEED Platinum* awards (Inditex, 2020).

3.5. Marketing Strategy:

"Marketing is still an art, and the marketing manager, as head chef, must creatively marshal all his marketing activities to advance the short and long term interests of his firm." (H. Borden, 1964).

Regarding the 4 P's to Zara company:

Product: Zara offers all kind of clothes and accessories for men, women, teenagers and children. It is a solution for everyone whether they want to buy formal or casual. The brand launches at least 10,000 new designs in a year, which makes it so diversified. Their commitment to environmental responsibility includes ethical and responsible standards in the use of animal-related products (Collect, Reuse, Recycle, 2019). Zara recycles its hangers and security tags, gives out their products in paper or biodegradable plastic bags and reuse clothes (Zara Marketing Mix (4Ps) Strategy, 2020).

Price: Zara's products are the latest fashion and low on prices. Zara has a low level of discounting around the year and discount sales of 50% or more twice in a year, during Christmas and Summer, for which the consumers anxiously wait (Zara Marketing Mix (4Ps) Strategy, 2020).

Promotion: Zara does not spend money on advertising. Unlike its competitors, the brand does not engage in any campaigns, reason why Zara's advertisements are not visible on television or outdoors, for example (Ghemawat & Nueno, 2006). The brand uses social media and influencers to promote new collections and promotions instead of expensive marketing tools once the brand believes that its show windows are sufficient for advertisements and they do not need anything else to sell their products (Roll, 2020).

Place: Zara has more than 2.000 stores in 106 markets plus its online store. Zara uses its unique business model to bring new products and fashion to the market in the shortest time possible. Most of the Zara stores are owned by the company and are not franchised. This helps in keeping the shopping experience at Zara intact and constant, independently of the country or city. The stores are located in bustling areas of city centres and locations are spacious and modern in look with walled mirrors and excellent lightings.

According to the information gathered on the Inditex website, each of the brands from the Group is supposed to have a similar internal structure. However, they operate independently and are responsible for their strategy, product design, sourcing and manufacturing, distribution, image, personnel, and financial results, while Group management sets the strategic vision of the group, coordinates the activities of the concepts, and provides with administrative services (Inditex, 2018).

3.6. STORES LOGISTIC:

Zara's universe is its stores, being its true brand image (Salgado & Blanco, 2006). The logistical process represents one of the keys to its success. There is built the entire production process, from the design of the pieces, through the manufacture and to the piece's distribution in its 2259 stores around the world.

The stores are spacious, comfortable, designed to the last detail in the laboratory installed for the purpose in Arteixo. They work as a meeting point with the customer and all the departments of the Group are at their service (Crofton & Dopico, 2007). The key to the stores' success relies consequently on the frenetic activity of logistics and distribution' organization. Each store is supposed to receive time the customer's orders. The main distribution center is located in Arteixo and since 2003 it has an extension of the same level in Zaragoza; both centers are the reception and distribution for most of the products that are sent to the stores around the world. Although there are two exceptions: the footwear that is sent directly from Elche, and the cosmetics, whose distribution is done individually by each store's supplier (Inditex, 2018).

3.7. ONLINE SHOPPING:

Worldwide, consumers increasingly expect content to emerge constantly and everywhere as they never get satisfied. ''Connected living'' is considered nowadays the new way of living. It is an essential part of every aspect of our daily lives, including health, travel, home and work. People are now considered emotional dependent on technology because when denied Internet connectivity, people tend to feel upset and lonely (Katawetawaraks & Wang, 2011).

Given the ongoing consumer desire to stay constantly connected and in new ways, consumers want their content to provide experiences that come along with their preferences, such as sports, food and movies (Kozinets, 2010). Now that we are living in desperate times with a threat of a massive crisis, the time has arrived to develop more deep and strategic relationships with consumers by focusing on the overall consumer experience, embracing new distribution platforms and methods.

Inditex has not only made use of the intensive labour through cooperatives and external workshops but has also invested in the cutting-edge technology implemented at all levels: management, design, production, logistics and marketing. This allows vertical integration of the business and also ensures that the piece of the designer’s imagination only takes a few days to reach every store.

Zara's commercial goal is designed to offer the latest trend in fashion. Its commercial strategy is characterized by a constant renewal of the product, an adjusted quantity of each model and a constant product rotation in its stores (Ghemawat & Nueno, 2006).

Zara also implements the limited production model to make the consumers buy when they see the product, because if they wait even for a little bit the piece may no longer be there anymore. The consumer should understand that the desire must assume the need and buy it immediately (Crofton & Dopico, 2007).

3.8. Zara’s E-Commerce Strategy:

E-retail by its definition is when retailers sell products or service via the Internet and, even though it can be seen as a direct marketing channel, it is considered an independent one because it has become one of the most used channels (Bickle, 2011).

Online shopping is seen by consumers as a convenient way to shop, but also a way to save time (Pate & Adams, 2013). With the continuous growth of the online and fashion market, the world is getting more technological and people are changing the way they shop. Brands are investing even more online because it is a market that is getting more users year by year (Gazzola, Pavione, Pezzetti & Grechi, 2020).

Companies like Zara are investing a lot more in online stores lately with the purpose of making the online shopping experience as good as in the physical stores, in a way to attract consumers’ attention so they will want to go back there. So, it is crucial that the website is organized and the most updated as possible.

4. METHODOLOGY

This research seeks to understand Zara online purchases and what effect the virus Covid19 had on them. By gathering information on which attributes consumers value the most when buying online, my goal was to understand what the main motivations were when opting for online shopping instead of going to a store.

In addition, the research had the purpose to understand which characteristics of the products and website/App were more valued by consumers, to identify which improvements could be made to the website/App to maintain and attract customers. In this sense, the market research data was obtained through an online survey (exhibit 1).

Given the problem and objectives presented in the previous chapters and bearing in mind the research questions presented, the empirical work will be based on a descriptive study of a quantitative nature. The data will be collected through an online survey and subsequently analysed with the help of JASP and Excel.

At the beginning of the online survey, an introductory text was presented explaining the purpose of the study and ensuring the confidentiality of the data obtained. In this introductory note, the respondent's contribution to the investigation is explained and total data confidentiality is guaranteed, as well as contact with the researcher in case of any doubts (exhibit 1). This introduction is very important, since it is the respondents' first point of contact with the questionnaire and may influence the quality of their cooperation.

The online survey was then organised and divided into four parts:

First part – Socio-demographic factors. In this part, an analysis of the consumer profile was made. It was based on five demographic variables (gender, age, academic qualifications, occupation, and place where they worked). All these questions were asked through multiple choice questions, with the options grouped by values/meanings.

Second part – Frequency of online shopping and changes due to the pandemic. It was asked the frequency of purchases and if changes were made on their shopping behaviour due to the pandemic. After, the respondents were asked about their frequency of online shopping and whether there were changes due to the pandemic or not. It was also asked what kind of items they bought at their last online purchase and if they would have bought those kinds of items online or instore in a non-pandemic situation.

After a multiple-choice question, respondents were asked if, since the beginning of the pandemic, they had bought clothes instore and if so, how many times.

The influence of fear of Covid infection on making purchases was also analysed. This question was asked using a Likert scale, with different means, where the minimum represents the "equally safer" and the maximum represents the "much more safer".

Third part – Purchasing habits at Zara Online. In this group, a question of the filter type was placed, in which the respondents who said that were Zara consumers represent the sample of the sample were selected. Then multiple-choice questions were more directed to consumption at Zara, where it was possible to obtain information linked to the type of Zara consumer, reason to buy at Zara, type of products that are purchased.

Then another filter question was made, aimed to filter online Zara clothing buyers. After this question, multiple-choice questions were asked to determine the reasons for buying or not buying clothes online and then specifically to buy online at Zara, the frequency of online shopping and the amount spent on their last purchase.

Finally, this group also contained another section that addressed the purchase motivations at Zara online. In this question, the option of "Others (please indicate which)" was also contemplated. To finalise this group, a question was also asked whether or not respondents preferred to buy online instead of instore on Zara.

Fourth part – In this last part, the objective was to understand what kind of items people bought during and after the pandemic; whether comfortable or formal ones. Multiple choices questions were used and it was only considered questions such as “I buy less than before the pandemic”, “I buy more than before the pandemic” and “I buy the same amount of items as before the pandemic”. These questions were made to establish connections later on.

The data collection for this questionnaire was carried out during August and September 2020. The online survey was shared through social media (such as Facebook, WhatsApp, and Instagram) and by email, so a greater diversity of responses could be achieved. 105 valid answers were collected and analysed.

After completing the distribution and collection of the questionnaires, the data was statistically analysed using Excel and JASP, to test the hypotheses presented in the chapter of the literature review and responding to the proposed objectives. An error margin of 0.05 will be defined for all analyses performed.

5. RESULTS AND DISCUSSION

5.1. Descriptive Analyses

5.1.1. Sociodemographic Factors

Concerning sociodemographic data, the following variables were analysed: gender, age, education level, and occupation. Concerning age, the online survey respondents average age was 36 years (with the youngest respondent being 14 years old and the oldest 77 years old) and the standard deviation was 16,41. 75% were women and 42% has a bachelor's degree. Finally, most of the respondents are currently working (69%).

5.1.2. Shops used to make purchases:

Most of the respondents tend to buy more Instore rather than online. Most of the Instore purchases are made "Monthly" (50), followed by "Annually" and "Weekly" (16). About Online purchases, most of them are made "Monthly" (35), followed by "Annually" (32) and "Never" (19). And most of them go to "Zara" (56), "Pull&Bear" (38) and "Stradivarius" (30).

With the pandemic, the respondents tend to buy less or the same amount of clothes (45 and 40 respectively – Figure 1). However, since the beginning of the pandemic, most of the respondents had already visited the stores to buy clothes (70%), and 18 had visited twice, 11 respondents had visited three times and 22 respondents had visited between five and twenty-five times (Figure 2).

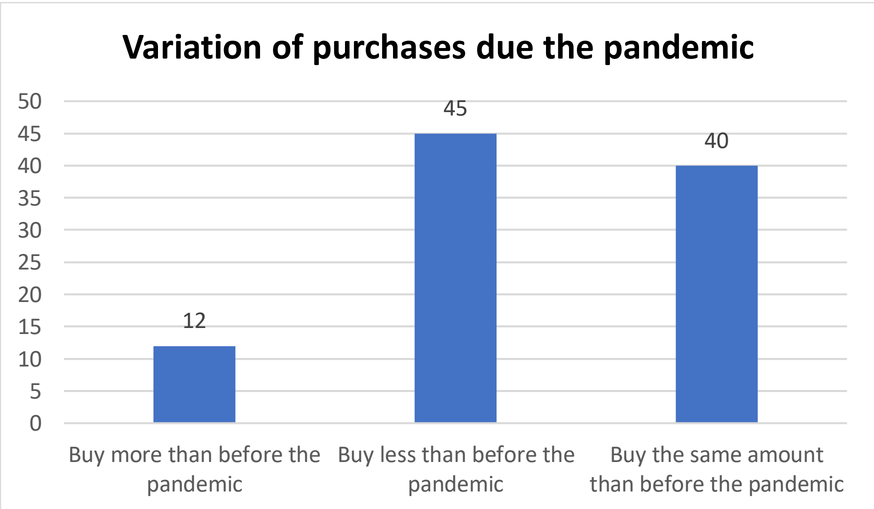

Figure 1 – Variation of purchases due to the pandemic

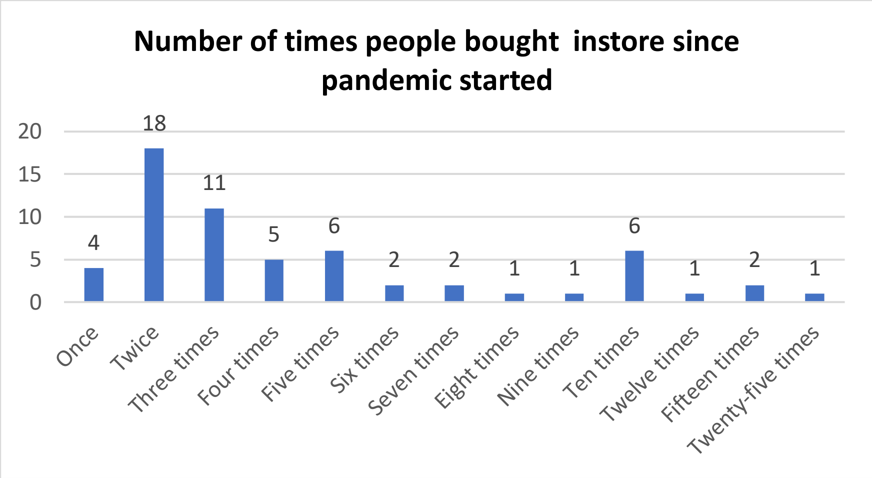

Figure 2 – Number of times people bought instore since pandemic started

When asked whether or not they were concerned about Covid19, 29 respondents said that they weren't afraid, 10 respondents said they had some fear, 22 said they were, 4 respondents had a lot of fear, 5 respondents had extreme fear and 38 respondents preferred not to answer as it is possible to see on the above figure.

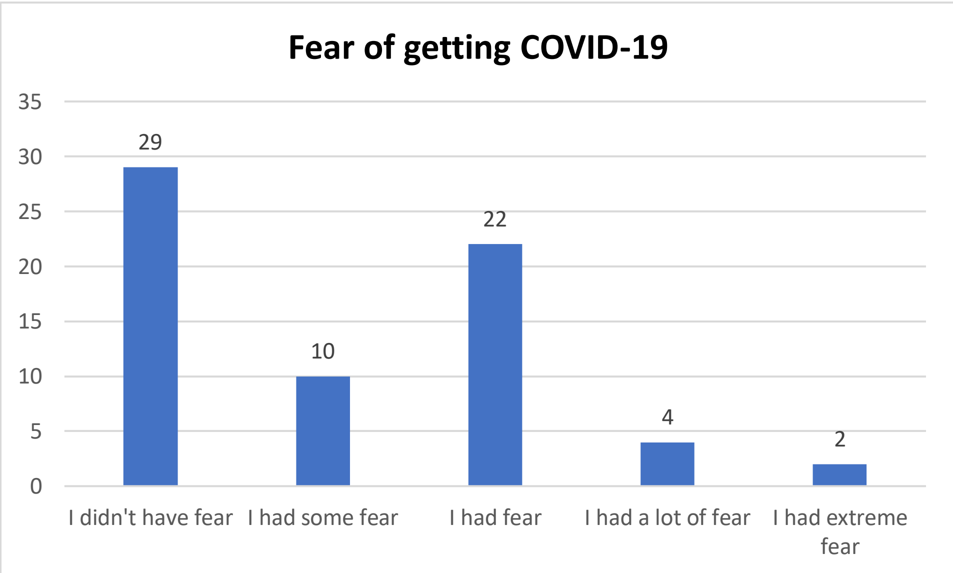

Figure 3 – Fear of getting Covid19 distribution

It was also relevant to ask the respondents if since the beginning of the pandemic they bought more comfortable or formal items on their online purchases. When concerning the comfortable items, 69% bought the same amount before and during the pandemic, 17% bought more than before the pandemic and 14% bought less than before the pandemic (Figure 4). On the other hand, regarding formal items, the answers are slightly different; 59% bought the same amount of clothes before and during the pandemic, 34% bought less than before the pandemic and only 7% bought more than before the pandemic (Figure 5).

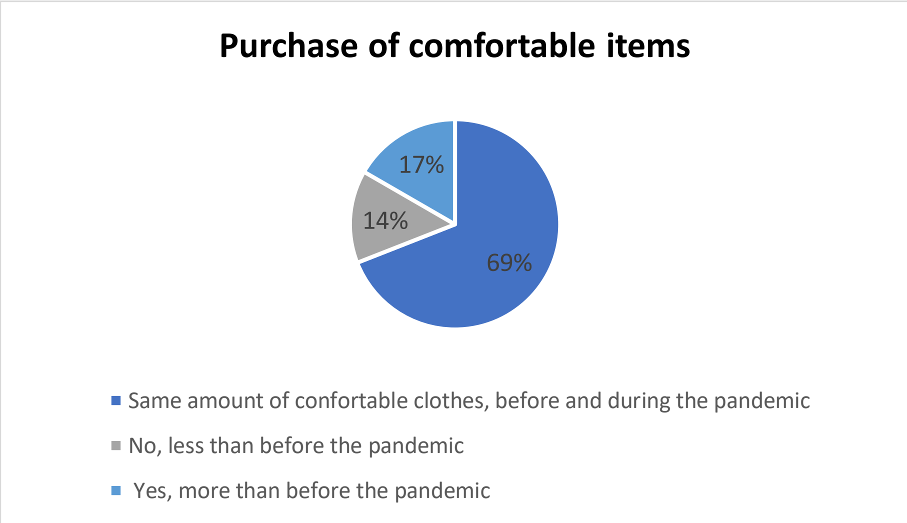

Figure 4 – Purchase of comfortable items distribution

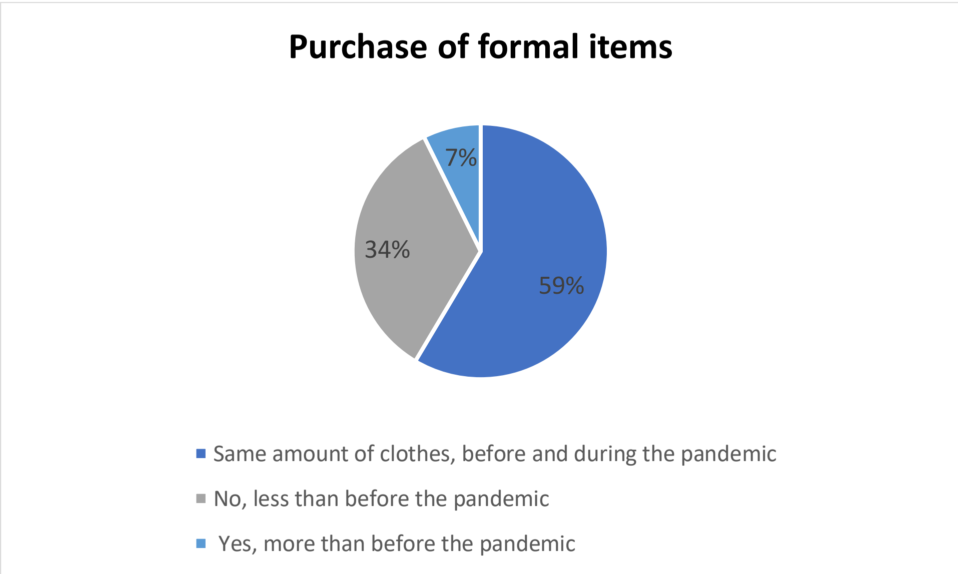

Figure 5 – Purchase of formal items distribution

5.1.3. Brand Awareness - Zara:

In order to know the brand awareness that Zara has in the online shopping market, respondents were asked if they knew Zara or not and whether if they considered themselves consumers of the brand. The majority knew Zara (94%) and considered themselves consumers (75%).

Additionally, to assess the familiarity with the brand, participants had to indicate what kind of consumers did they considered themselves. 67% considered themselves "Frequent" consumers and 33% considered themselves as "Sporadic" consumers.

Then I divided the analysis into two parts, instore purchases and online purchases. For the Instore purchases, it was relevant to understand the reasons why people buy Zara instead of other brands, from which sections they bought and what kind of pieces. Respondents said that the main reasons why they buy Zara are “Price/Quality ratio” (32%) and “Convenience” (19%) – Figure 6. Most of the items they buy at Zara are “Clothes” (54%), followed by “Shoes” (25%), from sections “Women” (45%) and “Trafaluc” (37%).

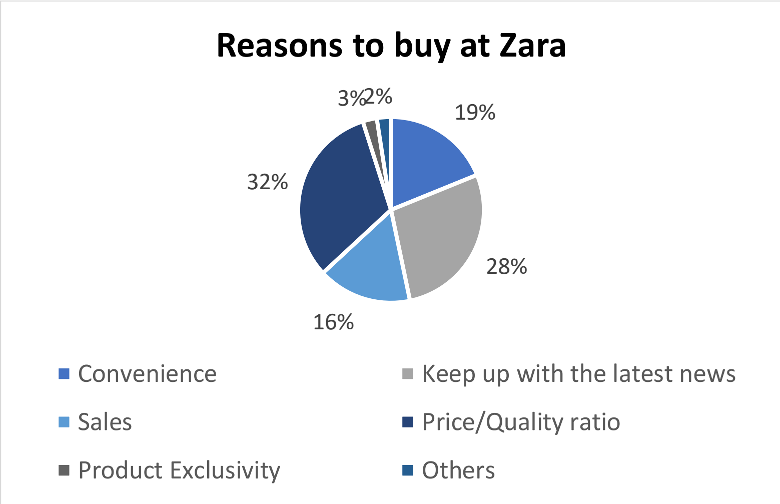

Figure 6 – Determinants of purchases at Zara

On the other hand, for the online purchases, respondents were asked about the frequency of their shops, the amount that they spent on their last online shop, the reason why they buy online or not, and whether or not they prefer to buy online instead of going to a store. Respondents said that they usually buy online at Zara “Monthly” (53%), having spent on their last purchase approximately between 20€-50€ (43%) and 51€-100€ (29%).

The main reasons why they buy online are the “easier delivery” (23,9%) and the “meeting of the deadlines” (19%); bearing in mind that the Website/App layout (18%) and its security (14,3%) are also important. A few respondents, 12, considered that “Quicker than going to a store” was important and 6 respondents answered that they bought online at Zara due to the “Easiness of returning/changing”, “Easiness to find the size”, “more products and options on the site” and that “sometimes the site had items that the consumer can’t find in their city” (Figure 7).

Figure 7 – Reason to buy online at Zara

On the other hand, 15 respondents said that they preferred to go to physical stores and to try the products instead of 11 respondents who preferred to try the products before buying them. Furthermore, 6 respondents said they needed to feel the quality of the products and 4 of the respondents said the advertising and publicity were missing. But when asked if they prefer to buy online instead of going to a store, the majority prefers to buy online (55%) – Figure 8.

Figure 8 – Reasons not to buy online at Zara

5.2. INFERENTIAL STATISTICS:

5.2.1. Pearson's Correlation

With the purpose of understanding whether there is an association between fear of contagion and online shopping, a Pearson correlation was performed. I chose this test because it is commonly used to study the relationship between two variables (two ordinal variables or a quantitative and a qualitative ordinal variable). If the dependence between the variables is verified, it is necessary to observe the correlation coefficient in order to understand the direction and intensity of the relationship, i.e., whether or not the relationship is positive or negative and whether or not this relationship is strong or weak. This conclusion is possible through a scale between -1 and 1.

To better understand whether the brand Zara empathically adapted to the new needs of the customers, seven Pearsons' correlations were done.

Table 1 – Correlations - Perception of safety in online shopping vs. frequency of online shopping.

Variable		Perception of safety in Online Shopping	Frequency of online shopping
Perception of safety in Online Shopping	n	—	
	Pearson's r	—	
	p-value	—	
Frequency of online shopping	n	105	—
	Pearson's r	0.052	—
	p-value	0.601	—

* p < .05, ** p < .01, *** p < .001

The first correlation performed intended to analyse the relation between perception of safety in online shopping vs. frequency of online shopping. For the analysis of the correlations, it became pertinent to understand the existing correlation between these two variables. Considering the *p-value (p=.601)*, we fail to reject the null hypothesis at $p > 0.05$ *(r=.052)*, and as such no conclusion can be taken for the relationship between – online shopping and perception of safety in online shopping.

Table 2 – Correlations - Number of instore purchases vs fear of getting Covid19.

Variable		Number of instore purchases	Fear of getting Covid19
Number of instore purchases	n	—	
	Pearson's r	—	
	p-value	—	
Fear of getting Covid19	n	105	—
	Pearson's r	-0.043	—
	p-value	0.660	—
* p < .05, ** p < .01, *** p < .001			

In this correlation, it was tested the possible relationship between the number of instore purchases and the fear of getting infected by the virus Covid19. As the *p-value (p=.660),* is higher than 0.05 so it is not considered statistically significant meaning we retain the null hypothesis $p > 0.05$ ($r=-.043$), and as such no conclusion can be taken for the relationship between these two variables.

Table 3 – Correlations - Perception of safety in online shopping vs. fear of getting Covid19.

Variable		Perception of safety in Online Shopping	Fear of getting Covid19
Perception of safety in Online Shopping	n	—	
	Pearson's r	—	
	p-value	—	
Fear of getting Covid19	n	105	—
	Pearson's r	-0.089	—
	p-value	0.365	—
*** p < .05, ** p < .01, *** p < .001**			

In this section it was performed a correlation between the variables perception of safety in online shopping and fear of getting infected by Covid19. Since the level of significance is greater than .05 *(p=.365)*, we fail to reject the null hypothesis $p > 0.05$ ($r=-.089$). With this information, it is not possible to reach any conclusion.

Table 4 – Correlations - Perception of safety in online shopping vs. online shopping behaviour at Zara.

Variable		Perception of safety in Online Shopping	Online Shopping Behaviour at Zara
Perception of safety in Online Shopping	n	—	
	Pearson's r	—	
	p-value	—	
Online Shopping Behaviour at Zara	n	105	—
	Pearson's r	-0.050	—
	p-value	0.612	—

* p < .05, ** p < .01, *** p < .001

The fourth correlation made had the goal to analyse any possible connection between the perception of safety in online shopping and the online shopping behaviour at Zara. As in the previous correlation, the level of significance is greater than .05 *p-value=.612* we also fail to reject the null hypothesis in this correlation *p > 0.05 (r=-.050)*. Therefore, it is not possible to verify if there is an association between perception of safety in online shopping and shopping behaviour at Zara.

Table 5 – Correlations - Fear of getting Covid19 vs online shopping behaviour at Zara.

Variable		Online Shopping Behaviour at Zara	Fear of getting Covid19
Online Shopping Behaviour at Zara	n	—	
	Pearson's r	—	
	p-value	—	
Fear of getting Covid19	n	105	—
	Pearson's r	-0.126	—
	p-value	0.202	—

* p < .05, ** p < .01, *** p < .001

In this correlation it was performed a linear correlation analysis in order to understand if there was an association between the online shopping behaviour at Zara and the fear of getting infected by the virus Covid19. However, the level of significance presented is higher than .05 *p-value=.202* so we retain the null hypothesis and *p > 0.05 (r=-.126)* and reject the alternatives hypothesis not being able to conclude if there is a correlation between - online shopping behaviour at Zara and the fear of getting Covid19.

Table 6 – Correlations – Frequency of online purchases at Zara vs online shopping behaviour at Zara.

Variable		Frequency of online purchases at Zara	Online shopping behaviour at Zara
Frequency of online purchases at Zara	n	—	
	Pearson's r	—	
	p-value	—	
Online shopping behaviour at Zara	n	105	—
	Pearson's r	-0.028	—
	p-value	0.773	—

* p < .05, ** p < .01, *** p < .001

This correlation was made to verify if there is a link between the frequency of online purchases at Zara and the online shopping behaviour at Zara. For the analysis of the correlation, it became pertinent to understand the existing correlation between these two variables. Considering the *p-value (p=.773)*, we fail to reject the null hypothesis at *p > 0.05 (r=-.028*), and as such no conclusion can be taken for the relationship between – frequency of online purchases at Zara and online shopping behaviour at Zara.

Table 7 – Correlations - Perception of safety in online shopping vs. frequency of online purchases at Zara.

Variable		Perception of safety in Online Shopping	Frequency of online purchases at Zara
Perception of safety in Online Shopping	n	—	
	Pearson's r	—	
	p-value	—	

Frequency of online purchases at Zara	n	105	—
	Pearson's r	0.004	—
	p-value	0.970	—

* p < .05, ** p < .01, *** p < .001

When analysing the correlation between the perception of safety in online shopping and the frequency of online purchases at Zara we cannot reach any conclusion concerning the possible connection between these two variables as the *p-value* is higher than .05 *(p=.970)*, leading us to retain the null hypothesis *p > 0.05 (r=.004*).

5.2.2. Chi-Square Test:

To make my analysis more relevant and to be able to better understand and interpret the results it was relevant to perform a Chi-Square Test (or also called a "goodness of fit" statistic). The Chi-Square Test makes a comparison between variables to understand whether they are related or not by measuring how well the observed distribution of data fits with the distribution that is expected if the variables are independent. In a more general sense, it tests to see whether distributions of categorical variables differ from each another. The Chi-square value and the degrees of freedom serve as an input for reaching the *p-value*. And when the statistics present a very small value it can be interpreted that there is a relationship; if the Chi-Square test statistics show a very large value it can be concluded that there is no relationship.

For these tests, I settled a significance level (denoted as α or alpha) of 0.05. I chose this value once a significance level of 0.05 indicates only a 5% risk of concluding that an association between the variables exists when there is no actual association.

Table 8 – Chi-square Test- Respondents behaviour on buying clothes instore after the pandemic.

	χ^2	df	p
Multinomial	91.600	2	< .001

Descriptives

	95% Confidence Interval

Variables	Observed	Expected: Multinomial	Lower	Upper
I buy fewer clothes than before the pandemic	81	35	71.322	89.011
I buy more clothes than before the pandemic	8	35	3.514	15.184
I buy the same amount of clothes than before the pandemic	16	35	9.417	24.741

Note. **Confidence intervals are based on independent binomial distributions.**

In this first Chi-square test, I intended to analyse if whether existed a relevant relationship between the variables "I buy fewer clothes than before the pandemic", "I buy more clothes than before the pandemic" and "I buy the same amount of clothes than before the pandemic " regarding the respondents behaviour on buying clothes instore after the pandemic. In these results, the Pearson chi-square statistic is $\chi^2=91.600$ with 2 degrees of freedom (*df=2*). In this scenario since the *p-value* is less than the significant level (*p-value* < .001 therefore < .05) it is possible to conclude that there is sufficient evidence that the observed distribution is not the same as the expected distribution, as a result, it can be assumed that exists a relationship between the categorical variables and a predominance of the variable "I buy less clothes than before the pandemic".

Table 9 – Chi-square Test - Respondents behaviour on buying clothes online after the pandemic.

	χ^2	df	p
Multinomial	72.400	2	< .001

Descriptives

			95% Confidence Interval	
Variables	**Observed**	**Expected: Multinomial**	**Lower**	**Upper**
I buy less clothes online than before the pandemic	17	35	10.210	25.885
I buy more clothes online than before the pandemic	76	35	65.939	84.693
I buy the same amount of clothes online than before the pandemic	12	35	6.349	20.068

Note. **Confidence intervals are based on independent binomial distributions.**

Secondly, the possible correlation between the variables "I buy fewer clothes than before the pandemic", "I buy more clothes than before the pandemic" and "I buy the same amount of clothes than before the pandemic " when it comes to the respondents behaviour on buying clothes online after the pandemic was tested. The likelihood chi-square statistic is $\chi^2=72.400$ with 2 degrees of freedom ($df=2$) and the $p\text{-}value < .001$. Therefore, at a significance level of .05, it is possible to reject the null hypothesis and conclude that there is a statistically significant association between the variables.

Assuming that the currencies are random, an expected value of 35 was obtained (each expected value is the same as there is no preference). Besides that, none of the cells has frequencies lower than 5, meaning that it is possible to make assumptions for the Chi-Square test.

Analysing the three variables, it is possible to conclude that the variable "I buy more clothes online than before the pandemic" has a bigger observed value and a higher confidence interval, determining that there is a preference.

Table 10 – Chi-square Test - Respondents behaviour on buying comfortable clothes online after the pandemic.

	χ^2	df	p
Multinomial	67.600	2	< .001

Descriptives

			95% Confidence Interval	
Variables	**Observed**	**Expected: Multinomial**	**Lower**	**Upper**
No, less than before the pandemic	9	35	4.194	16.431
Same amount as before and during the pandemic	22	35	14.302	31.485
Yes, more than before the pandemic	74	35	63.821	82.929

Note. **Confidence intervals are based on independent binomial distributions.**

Then, it was tested the possible correlation between the variables "No, less than before the pandemic", "Same amount as before the pandemic" and "Yes, more than before the pandemic" regarding the respondents behaviour on buying comfortable clothes online after the pandemic. In this table, the Chi-Square value is χ^2*=67.600* with 2 degrees of freedom (*df=2*). The probability of getting of that Chi-Square if the null hypothesis is true is $p < .001$. Once the *p-value < .001* (less than 5%), the null hypothesis can be rejected. Thus, the data is statistically different and random. Inferring then that there is a preference for the variable buying more online clothes than before the pandemic.

Table 11 – Chi-square Test – Respondents behaviour on buying formal clothes online after the pandemic.

	χ^2	df	p
Multinomial	59.200	2	< .001

Descriptives

			95% Confidence Interval	
Variables	Observed	Expected: Multinomial	Lower	Upper
No, less than before the pandemic	71	35	60.678	80.247
Same amount as before and during the pandemic	25	35	16.841	34.765
Yes, more than before the pandemic	9	35	4.194	16.431

Note. **Confidence intervals are based on independent binomial distributions.**

Lastly, it was performed a Chi-square test in order to see whether the distributions of the following categorical variables differ from each another: “No, less than before the pandemic”, “Same amount as before the pandemic” and “Yes, more than before the pandemic” regarding the respondents behaviour on buying formal clothes online after the pandemic. For a Chi-square test, when the *p-value* that is less than or equal to the significance level established it indicates there is sufficient evidence to conclude that the observed distribution is not the same as the expected distribution. The Chi-Square value is χ^2*=59.200* with 2 degrees of freedom (*df=2*) resulting in a *p-value < .001*, consequently $\leq \alpha$. The variables in scope have a statistically significant association (Rejecting then H_0) and it can be concluded that a relationship exists between the categorical variables. Once the data is statistically significant it can be inferred that there is a preference for the variable buying less formal clothes before the pandemic.

5.3. RESULTS - CONCLUSIONS

After carefully reviewing the online survey results and analysis, it is possible to conclude that the tendency is towards online shopping rather than going to a physical store, for the facility of the process and the meeting of the deadlines. However, both ways of shopping can complement each other.

During the past few years, Zara has been working in improving its online presence, without forgetting the importance of the physical stores, so that the online experience can be as good or even better as the instore. They are doing that by investing a lot in their website and app, its layout, design, security, and easiness to use.

Online shopping has been evolving through the years and will keep that way, as there is a lot more personalization and customization across the whole shopping funnel through improved use of data and technologies. By knowing more about the customer, retailers/brands/distributors will provide more tailored products and curated content that will ultimately elicit a more emotional response and will provide enough relevant information to make the customer feel more secure in their purchasing decision.

And it is very challenging all the time as the tendency is towards a very long-term trend in consumption whereby customers are demanding more and more. They want more speed, more choice, more convenience, and more inspiration.

6. CONCLUSIONS

RQ1: During the Covid19 crisis, have people changed their shopping behaviours?

Investigating the relationship between the decision/intention to shop online and the factors affecting such decision have pointed out that the online purchases are increasing exponentially day by day and that the main motivations for online shopping are the convenience of shopping, quicker deliveries and deadline meetings. It is also important to take into consideration that the comfort of shopping online (nonstop and everywhere) and saving time are also very relevant factors in these decisions.

By performing a Pearson's correlation it was not possible to statistically verify a correlation between the perception of safety in online shopping and buying more online clothes in general once the *p-value* obtained was higher than 0.5 *(p=.601)* leading us to retain the null hypothesis. However, by analysing separately the survey answers, it can be verified that online shopping is a determinant when it comes to buying more online clothes in general.

On the other hand, it is important to bear in mind the factors affecting consumers' decision to shop online, and how their decision can be affected by the product type. As demonstrated by the survey factors, meeting deadlines, facility to purchase and easy deliveries are the main factors influencing an online shop. Nonetheless, an important factor that influences the consumer's decision to buy online is having (or not) the products information available on the websites.

1a) Are they buying less or more than before the pandemic?

A Chi-Square test was done to be able to statistically measure the association between these two variables. The main objective was to study the people behaviour regarding their purchases after the pandemic. The test was statically significant *(p-value* $< .001$ therefore $p < .05$) , and it was possible to reject the null hypothesis $p < .05$ ($\chi^2=91.600;\ df=2$), reflecting then that people tend to buy less clothes instore after the pandemic.

1b) More specifically, are they buying more online than before the outbreak?

With these questions, I wanted to find out whether the people were buying more online after the outbreak. The Chi-Square demonstrated noteworthy results indicating that people are buying more online than before the pandemic (*p-value* $< .001$ and likelihood chi-square statistic $\chi^2=72.400$ with 2 degrees of freedom $df=2$). Therefore, at a significance level of .05, it is possible to reject the null hypothesis and conclude that there is a statistically significant association between the variables. Along with the survey data, it can be verified that this happens due to fear of contagion but also "easier delivery" and the "meeting of the deadlines" of the online shops.

RQ2: During this crisis context, have people changed their shopping behaviours at Zara?

During a crisis, people tend to react to it in a variety of ways. The needs for nonessential goods take precedence indicating a few major shifts in customer behaviour, as most of them change their priorities and deprioritise buying more formal items. As Kotler and Keller (2009) said it is crucial to understand how consumers are reacting and developing customized and personalized marketing strategies for each because a good understanding of customers' lives is crucial to ensure that the most appropriate products and services are being marketed to the right people in the most effective way possible.

Before Covid 19, there were behavioural approaches that could predict market dynamics. However, with these lockdowns, where people could not go to any shop at all and the only way of connecting was online, an individual orientation and a concern for the others and the planet emerged. There was a realignment of the present world situation and life principles. And brands and companies tried to keep up with these tendencies, by not only making more sustainable products but also by becoming their shipping packages recyclable. All of that made a huge impact on consumers' perspective and consequently increased online shopping (Mehta, Saxena, & Purohit, 2020).

2a) Have they started to buy more or fewer products?

Through empirical evidence gathered from the online survey and based on the analysis of primary and secondary data, it can be verified that during the quarantine people did more online purchases. By doing a correlation between the perception of safety in online shopping and fear of getting infected and between the perception of safety in online shopping and whether people tend to buy more online products at Zara the analysis was not conclusive as the p-value was greater than .05 *(p=.365;p=.612)* leading us to retain the null hypothesis. Also, when analysing the survey data it shows that the fear of getting Covid19 is one of the determinants that triggers an increase in online purchases at Zara.

Regarding the perception of safety in online shopping and the frequency of online purchases at Zara no statistical conclusions could be made whether if the variables are correlated or not once the *p-value* is higher than 0.5 *(p=.970)*. Though, by reviewing the survey's answers it is possible to conclude that the more people think online shopping is safer than going to stores, the more purchases they do.

2b) Have they started to buy different types of products?

To better answer this question two Chi-Square tests were performed. The goal was to find out whether people tend to buy more casual products instead of formal ones on their online purchases, due to their new lifestyles determined by the confinement. The test analysis has shown positive results demonstrating that the tendency is for people to buy more comfortable clothes online rather than formal ones.

In the first Chi-square test, the Chi-Square value is $\chi^2=67.600$ with 2 degrees of freedom *(df=2)* and a *p-value < .001*. Once the *p-value* is less than 5%, the null hypothesis can be rejected being the data statistically different and significant. Inferring then that there is a preference for the variable buying more online clothes than before the pandemic.

On the second one, the variables follow a Chi-Square distribution of $\chi^2=59.200$ with 2 degrees of freedom *(df=2)* reiterating the rejection of the null hypothesis and the fact that the data is statistically significant. It is then possible to conclude that there is a preference for the variable "buying less formal clothes than before the pandemic". Which goes according to the initial idea that aaccelerated adoption of online shopping led to an increase of homewear, loungewear and home products instead of formalwear (Gazzola, Pavione, Pezzetti & Grechi, 2020).

RQ3: During a crisis have brands created new categories on their websites with casual/home wear?

The behaviours, preferences, and shifts in mindset that people have adopted during the pandemic will lead to permanent changes and the fashion world will never be the same (Mehta, Saxena, & Purohit, 2020). The accelerated adoption of e-commerce, increased demand for purpose-driven brands and sustainability have taken over the market. Consumers will buy more and be more demanding when they do. And although it was possible to observe that the overall spending declined a little bit, the attraction in homewear, casualwear, home categories/products escalated (Gazzola, Pavione, Pezzetti & Grechi, 2020).

Channel shifts accelerated and sales through digital media overdriven. In order to keep customers' attention, brands had to strengthen their online presence through customization and improving online-shopping interfaces. To have a stronger push into direct-to-consumer channels, companies must update/expand their website and know that every brand is doing the same, there is an intensification of the competition for the perfect e-tail experience.

7. LIMITATIONS AND RECOMMENDATIONS FOR FUTURE WORKS

7.1. LIMITATIONS:

The scope of this study was to understand the factors that affect consumer buying behaviour on online shopping, along with the factors respecting the website design, reliability and security that may influence the consumer buying behaviour. Although the main objectives of the paper were fulfilled, without certain limitations, the study could have made more relevant.

The main limitation of the study was related to the fact that the sample obtained from the online survey (105 respondents) was not very wide and also not representative of the Portuguese population. As a result, it was not possible to reach any conclusions when performing the linear correlation analysis which would have been very important to have a better understanding of the subject. Another limitation, related to the online survey, was the closed-answer and self-completion questions. These kinds of questions allow a greater range of breadth of data collected. However, it limits the justification and deepening of the respondents' responses, as well as a possible more in-depth interpretation of the data. Besides, self-completion can also lead to bias, resulting from a communication failure, falsification of responses or random responses. Therefore, although the response rate was satisfactory, a larger sample would have made possible to assess the robustness of the relationships found in the study and would have provided more accurate and precise conclusions.

Another limitation is related to geography. This study was focused mostly on Portuguese people; users in other countries could have different views and opinions making this thesis more interesting.

Besides, access to information was sometimes restricted, due to the fact that reports from the online purchases are only available on the internet and they lack information. Furthermore, as the market is extremely competitive, companies have an incentive in protecting such information. Legislation, political changes and conflicts regarding this theme force the market to be in constant change, a factor that adds up to the difficulties felt during the scope of the work.

Finally, it would be interesting to study the impact of investing in advertising on the company's results, to understand the impact on the company's financial income, the number of online purchases (and its comparison with the instore) and the number of App's downloads.

An awareness of these limitations prevented any jumping to unsubstantiated assumptions or conclusions.

7.2. RECOMMENDATIONS:

In order to give valuable recommendations that can be helpful to the company's strategy, this section will be focused on three key points: the capacity to adapt to customers' demands, advertising and inventories.

The conclusions gathered along the paper made clear that as part of an extremely competitive market, attracting new customers in a fast and effective way becomes vital. Zara has already a consistent name among the online shopping market, as suggested by the conducted survey, and the user base is considered high, as 75% of the survey respondents do online purchases at Zara. However, there are opportunities to gain market share as respondents were saying that they did not do online purchases due to lack of adaptation. Therefore, the marketing message should be adapted to make it possible to reach consumer acceptance (Bickle, 2011) and to reach a wide number of people at the same time. It is also crucial to consider the community and adapt their collections to the different tastes and trends in each market as in each country, we can find diverse cultures and beliefs, different tastes and styles. For example, according to The Economist Magazine, a Zara designer shared an idea saying that another opportunity to gain more customers could rely on adapting the clothes' tones to each country/continent - Chinese women prefer clothes in pastels tones to favour their pale skin and European women prefer stronger colours but both of them have similar tastes (The Economist Magazine, 2012).

With the increasing demand for technology and online purchases, it could be an asset for Zara to put more effort into advertising to make the service add value when compared to its competitors – faster delivers, videos for the consumer to feel like they are trying the products and sensing the quality of the product. Additionally, unlike their major competitor, H&M, Zara does not invest in collaborations with well-known designers and celebrities. These collaborations create a lot of interest in customers, especially young customers, in buying that product, which could be very interesting for Zara to bet on this kind of strategy.

To finish, the reports revealed that Zara has low inventories in-store, Zara's stores receive goods twice a week (Aftab, Yuanjian, Kabir &Barua, 2018), deliveries in small batches because it is a way of reducing the cost of having too many inventories. Besides that, the stores have few quantities of each product. When a client goes looking for a specific product, and that product is no longer there, the store can lose that sale.

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9. APPENDIX

Exhibit 1 – Online Survey

Retrieved from 14th August 2020 to 23rd October 2020.

Welcome to the Zara brand-consumer survey.

The survey has 3 minutes duration and aims to obtain data for the realization of a NOVA IMS master's project.

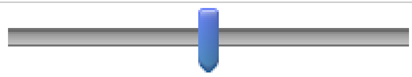
There are no right or wrong answers. The data will be analysed only for this specific academic project

Thank you very much for participating!

Q1) What is your gender?

a. Female
b. Male
c. Other

Q2) What is your age? (years)

	0 10 20 30 40 50 60 70 80 90 100
Age (years)	

Q3) What is your academic qualification?

a. High school
b. Professional Course
c. Bachelor's degree
d. Master's degree
e. PhD
f. Other

Q4) What is your occupation?

a. Student
b. Worker - Student
c. Self-employed
d. Employed
e. Unemployed
f. Other (indicate which) _______________

Q5) From where do you work at the moment?

a. Home
b. Office/Company
c. Mix/Rotation

Q6) How frequent do you buy clothes?

a. Daily
b. Weekly
c. Monthly
d. Annually
e. Rarely

Q7) With the pandemic:

a. I buy more clothes than before the pandemic
b. I buy less clothes than before the pandemic
c. I buy the same amount of clothes than before the pandemic

Q8) How frequent do you buy clothes online?

a. Daily
b. Weekly
c. Monthly
d. Annually
e. Rarely

Q9) Regarding online shopping, with the pandemic:

a. I buy more clothes online than before the pandemic
b. I buy less clothes online than before the pandemic
c. I buy the same amount of clothes online than before the pandemic

Q10) What kind of items did you buy on the last online shop?

a. Clothes
b. Shoes
c. Accessories
d. I don't remember

Q11) On a non-pandemic situation, would you buy clothes online or instore?

a. Online
b. Instore

Q12) On a non-pandemic situation, would you buy shoes online or instore?

a. Online
b. Instore

Q13) On a non-pandemic situation, would you buy accessories online or instore?

a. Online
b. Instore

Q14) What stores do you use to buy clothes physically?

a. Zara
b. Massimo Dutti
c. H&M
d. Pull&Bear
e. C&A
f. Uterque
g. Stradivarius
h. Other

Q15) What stores do you use to buy clothes online?

a. Zara
b. Massimo Dutti
c. H&M
d. Pull&Bear
e. C&A
f. Uterque
g. Stradivarius
h. Other

Q16) Since the beginning of the pandemic, have you bought clothes physically?

a. Yes
b. No

If the answer to Q16 was "Yes":

Q17) How many times (approximately)?

Q18) During the shop, were you afraid of getting Covid19?

a. I didn't have fear at all
b. I had a little bit of fear
c. I had some fear
d. I had a lot of fear
e. I was extremely afraid

If the answer to Q16 was "No":

Q19) Why?

a. I was afraid of getting Covid19
b. I didn't need to
c. Other reasons

Q20) In terms of contagion with Covid19, do you think online shops are equally safe or more secure than physical stores?

a. Equally safer
b. A little bit safer
c. More safer
d. Much more safer

Q21) Zara is an international and diversified retail brand, with stores in the main cities in the world and also online.

Q22) Do you know the brand ZARA?

a. Yes
b. No

Q23) Are you a Zara consumer?

a. Yes
b. No

Q24) What kind of consumer are you?

a. Frequent
b. Sporadic

Q25) Why do you buy from Zara?

a. Convenience
b. Keep up with the last trends
c. Sales
d. Price Quality ratio
e. Products exclusivity
f. Other (indicate which) ________________

If the answer to Q23 was “Yes”:

Q26) From which section do you usually buy?

a. Kids
b. Trafaluc
c. Women
d. Men
e. I don’t know

Q27) What kind of pieces do you usually buy?

a. Clothes
b. Shoes
c. Accessories
d. Perfumery
e. I don’t know

Q28) Do you buy from Zara online?

a. Yes
b. No

If the answer to Q28 was “Yes”:

Q29) Why do you buy from Zara online? Determinants of online purchase of Zara:

a. Product quality
b. Brand reputation/awareness
c. Website and/or APP layout
d. Website and/or APP security
e. Payment options
f. Delivered within the estimated time
g. Easy deliver
h. Quicker than going to a store
i. I don’t know

If the answer to Q28 was “No”:

Q30) Why don’t you buy from Zara online?

a. I do not trust in online shopping
b. I prefer going to physical stores
c. I like to try the products first
d. I don’t want to pay the shipping costs
e. Extended deliveries
f. Change/ Return policies
g. Other (indicate which) _______________

If the answer to Q28 was “Yes”:

Q31) How often do you make online purchases?

a. Daily
b. Weekly
c. Monthly
d. Annually
e. Rarely
f. I don’t know

Q32) How much did you spend on your last purchase on Zara online?

a. Until 20€
b. 20€ - 50€
c. 51€ - 100€
d. 101€ - 200€
e. 201€ - 500€
f. > 500€
g. I don’t remember

Q33) Taking all aspects into account, do you prefer to buy online instead of going to a store?

a. Yes
b. No

Q34) During the quarantine caused by the virus Covid19 a lot of brands created on their websites a section called "Homewear/Comfortable clothes".

Q35) Since the beginning of the pandemic, on your online shops, did you buy more comfortable clothes than you used to do?

a. Yes, more than before the pandemic
b. No, less than before the pandemic
c. Same amount as before and during the pandemic

Q36) Since the beginning of the pandemic, on your online shops, did you buy more formal clothes than you used to do?

a. Yes, more than before the pandemic
b. No, less than before the pandemic
c. Same amount as before and during the pandemic

Q37) Do you like fashion?

a. No
b. A little bit
c. A lot

Q38) Thank you for participating!

Exhibit 2 – Survey Respondent's Demographics

Table 12 – Age distribution

N	Valid	99
	Omisso	6
Standard desviation		16.40816
Variance		269.228
Minimum		14.00
Maximum		77.00

Table 13 – Gender distribution

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Feminino	72	68.6	73.5	73.5
	Masculino	24	22.9	24.5	98.0
	Outro	2	1.9	2.0	100.0
	Total	98	93.3	100.0	
Missing	System	7	6.7		
Total		105	100.0		

Table 14 – Academic qualifications distribution

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ensino Básico ou Inferior	7	6.7	7.2	7.2
	Curso Profissional	4	3.8	4.1	11.3
	Licenciatura	41	39.0	42.3	53.6
	Mestrado	33	31.4	34.0	87.6
	Doutoramento	9	8.6	9.3	96.9
	Outro	3	2.9	3.1	100.0
	Total	97	92.4	100.0	
Missing	System	8	7.6		
Total		105	100.0		

Table 15 – Occupation distribution

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Estudante	22	21.0	22.7	22.7
	Trabalhador - Estudante	14	13.3	14.4	37.1
	Trabalhador por conta própria	22	21.0	22.7	59.8
	Trabalhador por conta de outrém	32	30.5	33.0	92.8
	Desempregado	4	3.8	4.1	96.9
	Outro (indique qual)	3	2.9	3.1	100.0
	Total	97	92.4	100.0	
Missing	System	8	7.6		
Total		105	100.0		

Table 16 – Occupation distribution: Other (which)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		102	97.1	97.1	97.1
	Dona de casa	1	1.0	1.0	98.1

	Estagiária	1	1.0	1.0	99.0
	Mãe	1	1.0	1.0	100.0
	Total	105	100.0	100.0	

Exhibit 3 – Survey Respondent's Demographics

Table 17 – Frequency of purchases distribution

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Anualmente	17	16.2	17.5	17.5
	Muito raramente	50	47.6	51.5	69.1
	Semanalmente	16	15.2	16.5	85.6
	Muito raramente	14	13.3	14.4	100.0
	Total	97	92.4	100.0	
Missing	System	8	7.6		
Total		105	100.0		

Table 18 – Frequency of purchases with pandemic distribution

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Compro mais vestuário do que antes da pandemia	12	11.4	12.4	12.4
	Compro menos vestuário do que antes da pandemia	45	42.9	46.4	58.8
	Compro igual quantidade de vestuário ao que comprava antes da pandemia	40	38.1	41.2	100.0
	Total	97	92.4	100.0	
Missing	System	8	7.6		
Total		105	100.0		

Table 19 – Frequency of online purchases distribution

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Semanalmente	10	9.5	10.3	10.3
	Mensalmente	35	33.3	36.1	46.4
	Anualmente	33	31.4	34.0	80.4
	Nunca	19	18.1	19.6	100.0
	Total	97	92.4	100.0	
Missing	System	8	7.6		
Total		105	100.0		

Table 20 - Frequency of online purchases with pandemic distribution

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Compro mais vestuário online do que antes da pandemia	1	1.0	100.0	100.0
Missing	System	104	99.0		
Total		105	100.0		

Table 21 – Survey of respondents' most common stores used to buy clothes instore

		Que lojas utiliza para comprar vestuário persencialmente na loja (pode selecionar múltiplas opções)? - Selected Choice Zara	Que lojas utiliza para comprar vestuário persencialmente na loja (pode selecionar múltiplas opções)? - Selected Choice Massimo Dutti	Que lojas utiliza para comprar vestuário persencialmente na loja (pode selecionar múltiplas opções)? - Selected Choice H&M	Que lojas utiliza para comprar vestuário persencialmente na loja (pode selecionar múltiplas opções)? - Selected Choice Pull&Bear	Que lojas utiliza para comprar vestuário persencialmente na loja (pode selecionar múltiplas opções)? - Selected Choice C&A	Que lojas utiliza para comprar vestuário persencialmente na loja (pode selecionar múltiplas opções)? - Selected Choice Uterque
N	Valid	56	23	30	38	7	11
	Missing	49	82	75	67	98	94

Table 22 - Survey of respondents' most common stores used to buy clothes online

		Que lojas utiliza para comprar vestuário online (pode selecionar múltiplas opções)? - Selected Choice Zara	Que lojas utiliza para comprar vestuário online (pode selecionar múltiplas opções)? - Selected Choice Massimo Dutti	Que lojas utiliza para comprar vestuário online (pode selecionar múltiplas opções)? - Selected Choice H&M	Que lojas utiliza para comprar vestuário online (pode selecionar múltiplas opções)? - Selected Choice Pull&Bear	Que lojas utiliza para comprar vestuário online (pode selecionar múltiplas opções)? - Selected Choice C&A
N	Valid	0	0	0	0	0
	Missing	105	105	105	105	105

Table 23 – Survey of respondents' choice of buying clothes instore since the beginning of the pandemic

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Sim	68	64.8	70.1	70.1
	Não	29	27.6	29.9	100.0
	Total	97	92.4	100.0	
Missing	System	8	7.6		
Total		105	100.0		

Table 24 – Survey of respondents – Number of times they bought clothes instore since the beginning of the pandemic

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	4	3.8	6.7	6.7
	2	18	17.1	30.0	36.7
	3	11	10.5	18.3	55.0
	4	5	4.8	8.3	63.3
	5	6	5.7	10.0	73.3
	6	2	1.9	3.3	76.7
	7	2	1.9	3.3	80.0
	8	1	1.0	1.7	81.7
	9	1	1.0	1.7	83.3
	10	6	5.7	10.0	93.3
	12	1	1.0	1.7	95.0
	15	2	1.9	3.3	98.3
	25	1	1.0	1.7	100.0
	Total	60	57.1	100.0	
Missing	System	45	42.9		
Total		105	100.0		

Table 25 – Survey of respondents – Fear of infection

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Não tive receio nenhum	29	27.6	43.3	43.3
	Tive receio	22	21.0	32.8	76.1
	Tive algum receio	10	9.5	14.9	91.0
	Tive bastante receio	4	3.8	6.0	97.0
	Tive muitissimo receio	2	1.9	3.0	100.0
	Total	67	63.8	100.0	
Missing	System	38	36.2		
Total		105	100.0		

Table 26 – Survey of respondents - Main reasons for being afraid of getting Covid19 while shopping

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Tive receio de apanhar Covid19	2	1.9	7.1	7.1
	Outras razões (indique qual)	6	5.7	21.4	28.6
	4	20	19.0	71.4	100.0
	Total	28	26.7	100.0	
Missing	System	77	73.3		

Total	105	100.0		

Table 27 – Survey of respondents - Other reasons of being afraid of getting Covid19 while shopping

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		99	94.3	94.3	94.3
	Centros comerciais fechados e passei a comprar online	1	1.0	1.0	95.2
	Começo a preferir comprar sempre on-line e a usar as lojas físicas apenas para trocas e devoluções.	1	1.0	1.0	96.2
	Durante o covid lojas estavam fechadas e como estava sempre em casa acabou conseguia receber tudo em casa, sem problemas. Acho que agora até prefiro comprar online	1	1.0	1.0	97.1
	Evitar locais públicos	1	1.0	1.0	98.1
	Não consigo estar de máscara e a escolher roupa	1	1.0	1.0	99.0
	Não tive paciência para as filas	1	1.0	1.0	100.0
	Total	105	100.0	100.0	

Table 28 – Survey respondents' awareness of brand

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Sim	89	84.8	93.7	93.7
	Não	6	5.7	6.3	100.0
	Total	95	90.5	100.0	
Missing	System	10	9.5		
Total		105	100.0		

Table 29 – Survey respondents – Do you consider yourself a Zara consumer?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Sim	67	63.8	75.3	75.3
	Não	22	21.0	24.7	100.0
	Total	89	84.8	100.0	
Missing	System	16	15.2		

Total	105	100.0		

Table 30 – Survey respondents – What kind of consumer are you?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Frequente	45	42.9	67.2	67.2
	Esporádico	22	21.0	32.8	100.0
	Total	67	63.8	100.0	
Missing	System	38	36.2		
Total		105	100.0		

Table 31 – Survey respondents – How much did you spend approximately on the last purchase at Zara?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Até 20€	6	5.7	14.3	14.3
	20€ - 50€	18	17.1	42.9	57.1
	51€ - 100€	12	11.4	28.6	85.7
	101€ - 200€	4	3.8	9.5	95.2
	Não me recordo certo	2	1.9	4.8	100.0
	Total	42	40.0	100.0	
Missing	System	63	60.0		
Total		105	100.0		

Table 32 – Survey respondents – Reason why they buy instore at Zara

		Com que frequência faz compras online na Zara? Diariamente	Com que frequência faz compras online na Zara? Semanalmente	Com que frequência faz compras online na Zara? Mensalmente	Com que frequência faz compras online na Zara? Anualmente	Com que frequência faz compras online na Zara? Muito raramente
N	Valid	1	7	24	9	4
	Missing	104	98	81	96	101

Table 33 – Survey respondents – Reason why they buy online at Zara

		Por que motivo faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Qualidade dos produtos	Por que motivo faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Notoriedade da Marca	Por que motivo faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Layout do Website e da APP	Por que motivo faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Segurança do Website e da APP	Por que motivo faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Opções de pagamento	Por esc Cu
N	Valid	13	7	19	15	11	

Missing	92	98	86	90	94

Table 34 – Survey respondents – Reason why they don't buy online at Zara

		Porque motivo não faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Não confio no método	Porque motivo não faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Prefiro as lojas físicas	Porque motivo não faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Gosto de experimentar os produtos	Porque motivo não faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Não pretendo pagar os custos de envio	Porque motivo não faz compras online na Zara (pode escolher múltiplas opções)? - Selected Choice Prazos de entrega muito alargados	Porq não fa onlin (pode m opç Selec Poli Trocas
N	Valid	0	15	11	3	4	
	Missing	105	90	94	104	104	

Table 35 – Survey respondents – What kind of items do consumers buy at Zara

		Na Zara que tipos de artigos costuma comprar (pode escolher múltiplas opções)? Roupa	Na Zara que tipos de artigos costuma comprar (pode escolher múltiplas opções)? Calçado	Na Zara que tipos de artigos costuma comprar (pode escolher múltiplas opções)? Acessórios	Na Zara que tipos de artigos costuma comprar (pode escolher múltiplas opções)? Perfumaria
N	Valid	61	28	22	2
	Missing	44	77	83	103

Table 36 – Survey respondents – From which sections do consumers buy at Zara

		Na Zara, compra artigos de que seção (pode escolher múltiplas opções)? Criança	Na Zara, compra artigos de que seção (pode escolher múltiplas opções)? Trafaluc	Na Zara, compra artigos de que seção (pode escolher múltiplas opções)? Senhora	Na Zara, compra artigos de que seção (pode escolher múltiplas opções)? Homem
N	Valid	14	46	55	8
	Missing	91	59	50	97